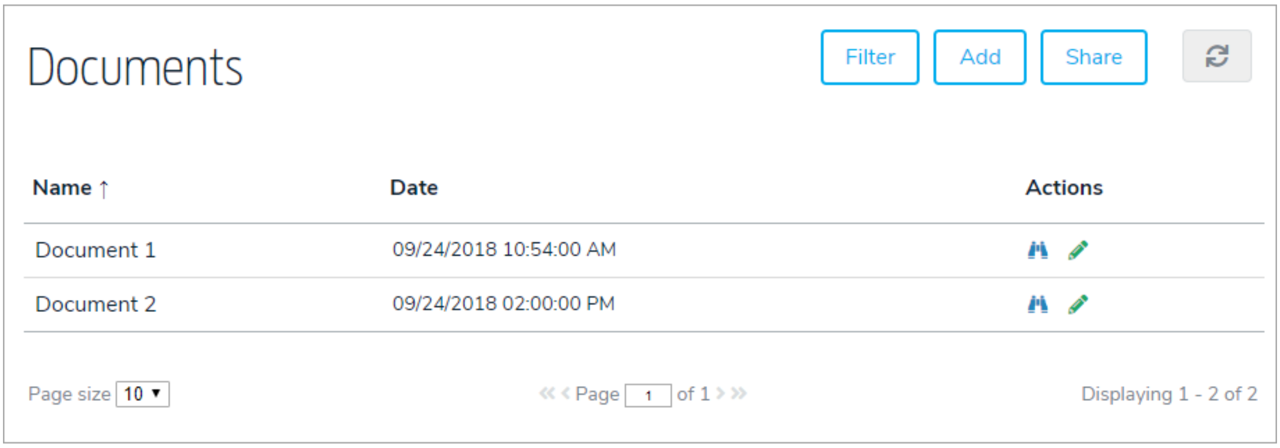
Table of Contents

Global AlertLink User's Guide 3
Documents 3
Documents Overview 3
Add a Document 4
View, Filter & Sort Documents 5
Document Files 6
Document Relationships 7
Document Categories 8
Document Shares 9
Document Properties 10

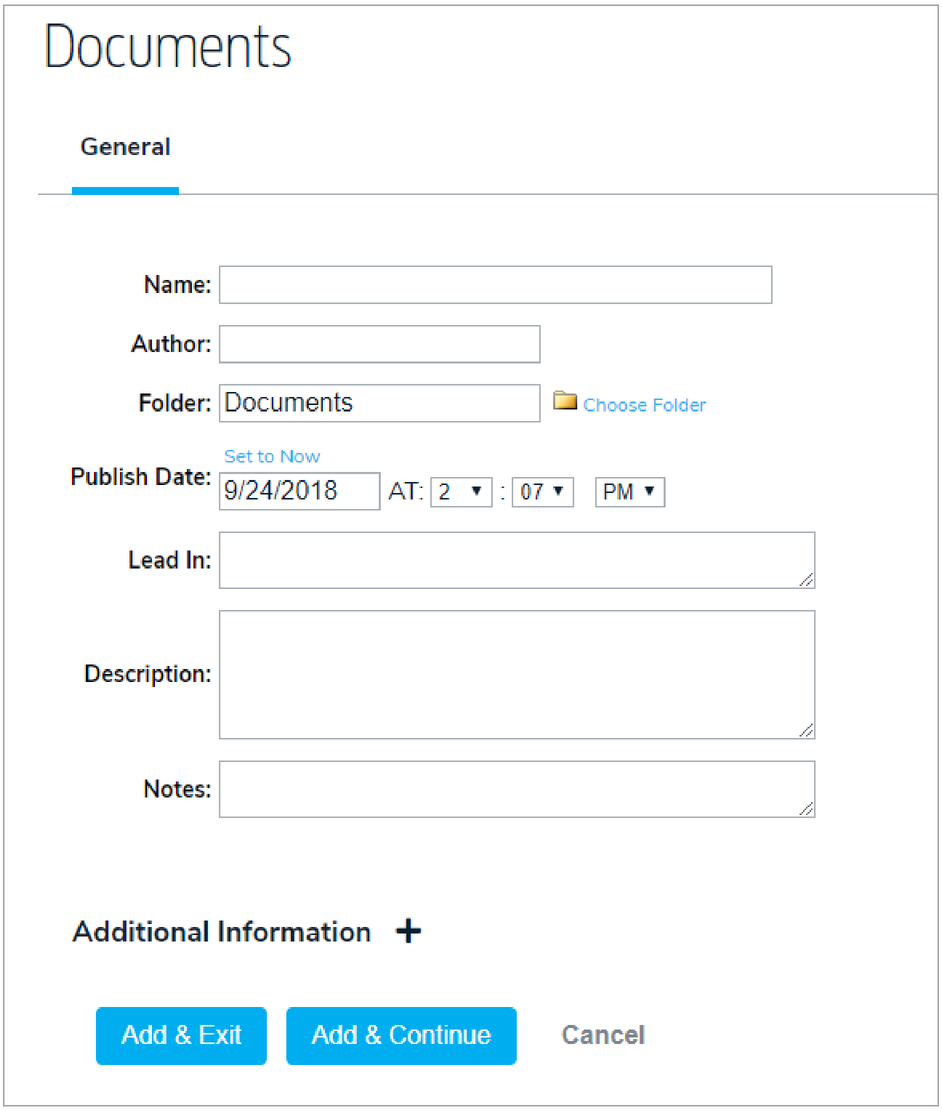
Documents Overview

Documents provides a sophisticated knowledge management solution to store and manage the critical information needed in critical situations. Through this system, you can upload electronic files, provide links to intranet or internet applications, or simply load content into the database. All data loaded is tagged, categorized and stored in custom folders for easy retrieval and searching.



Add a Document

1. To add a document, click Documents in the navigation bar, then click Add.
2. Enter a name and author for the document.

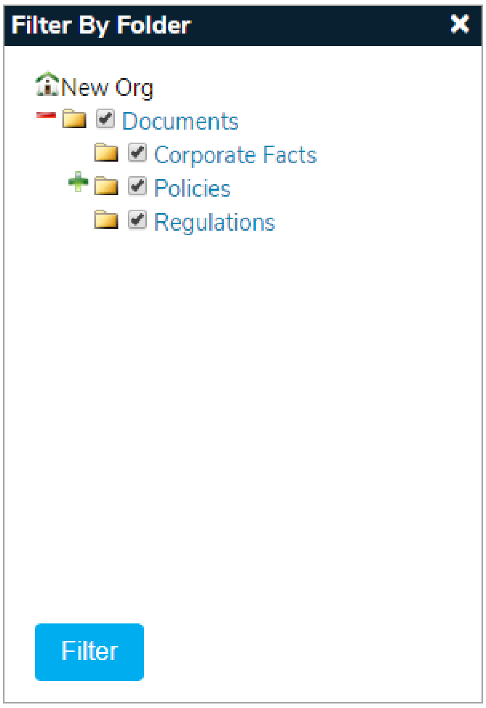


3. If required, choose a new folder for the document.
4. Enter a publishing time and date.
5. If required, enter a lead in, description, and/or notes.
6. Enter data in any custom fields in the Additional Information section as needed.
7. Click Add & Continue to save your changes and view additional options.

View, Filter & Sort Documents

To view an existing document, click the Documents icon in the navigation bar, then click the icon in the Actions column. To edit the record, click the icon.

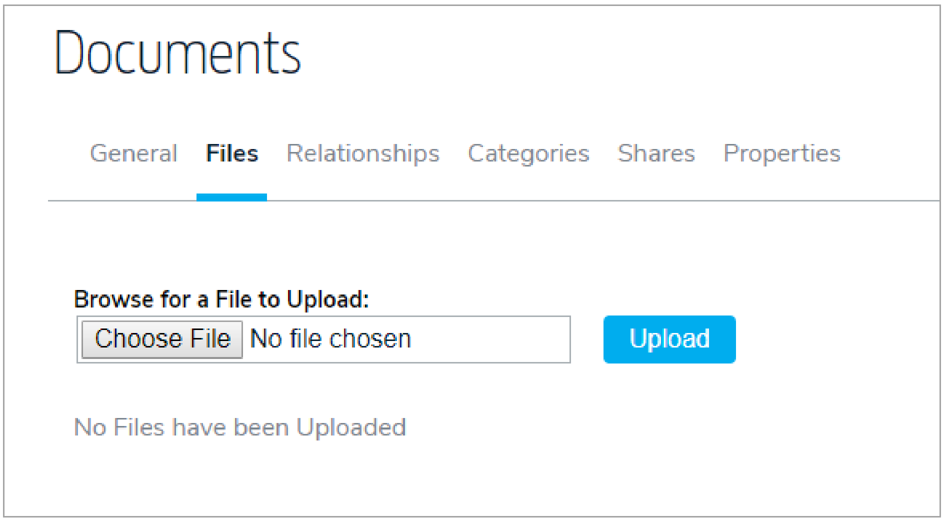
To filter the records by folder, click Filter, then select a folder.



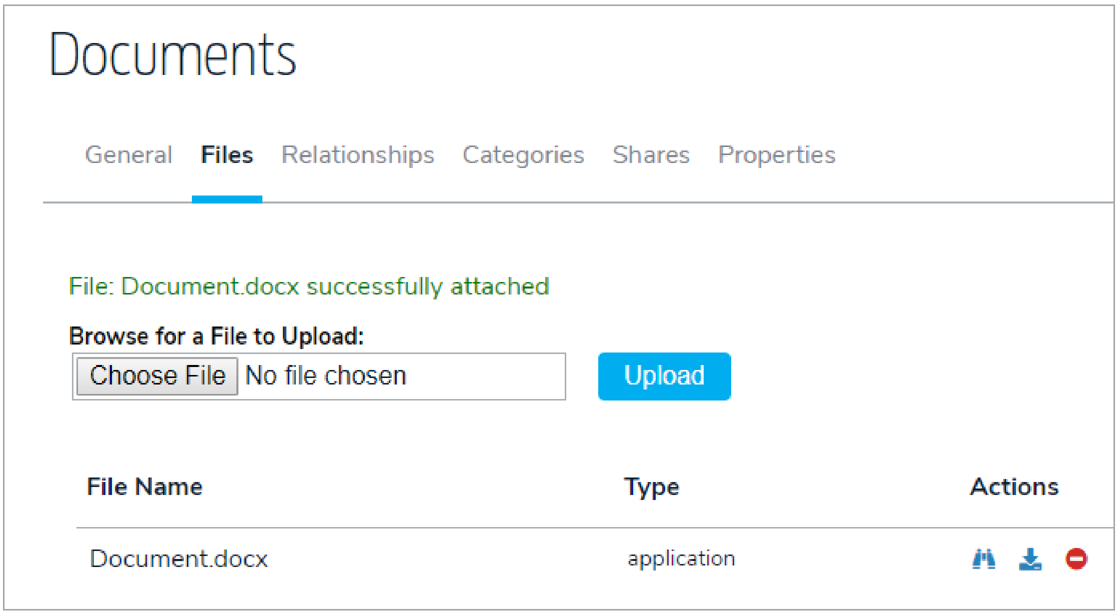
To sort the records, click the column headers.

Document Files

1. To upload a file to a document record, click Documents in the navigation bar, then open the record.
2. Click the Files tab.



3. Click Choose File, locate the file you want to upload, then click Open.
4. Click Upload.



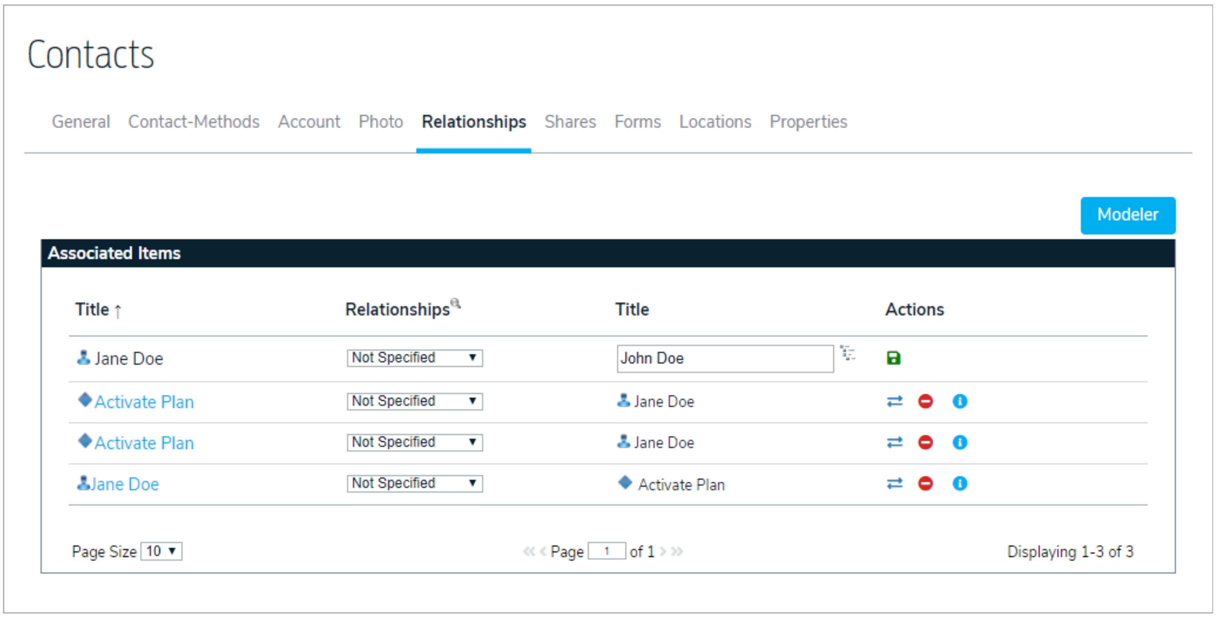
Document Relationships

You can create relationships between items and any record type (except for News & Updates) through the **Relationships** tab of that record.

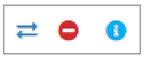
For more relationship features, see the Relationship Mapping tool in Administration, the Relationship Editor form type, or the relationship builder tool on custom forms.

To add a relationship from the Relationships tab of a record:

1. Navigate to the applicable organization and open the record.
2. Click the **Relationships** tab.
3. Select a relationship type from the dropdown menu in the **Relationships** column. Relationship types are configured in the Referential Data settings.
4. Click the textbox on the left of the top row and enter keywords to search for and select an object or click the  icon to the right of the text field to display the **Association Tree**, then select an object.



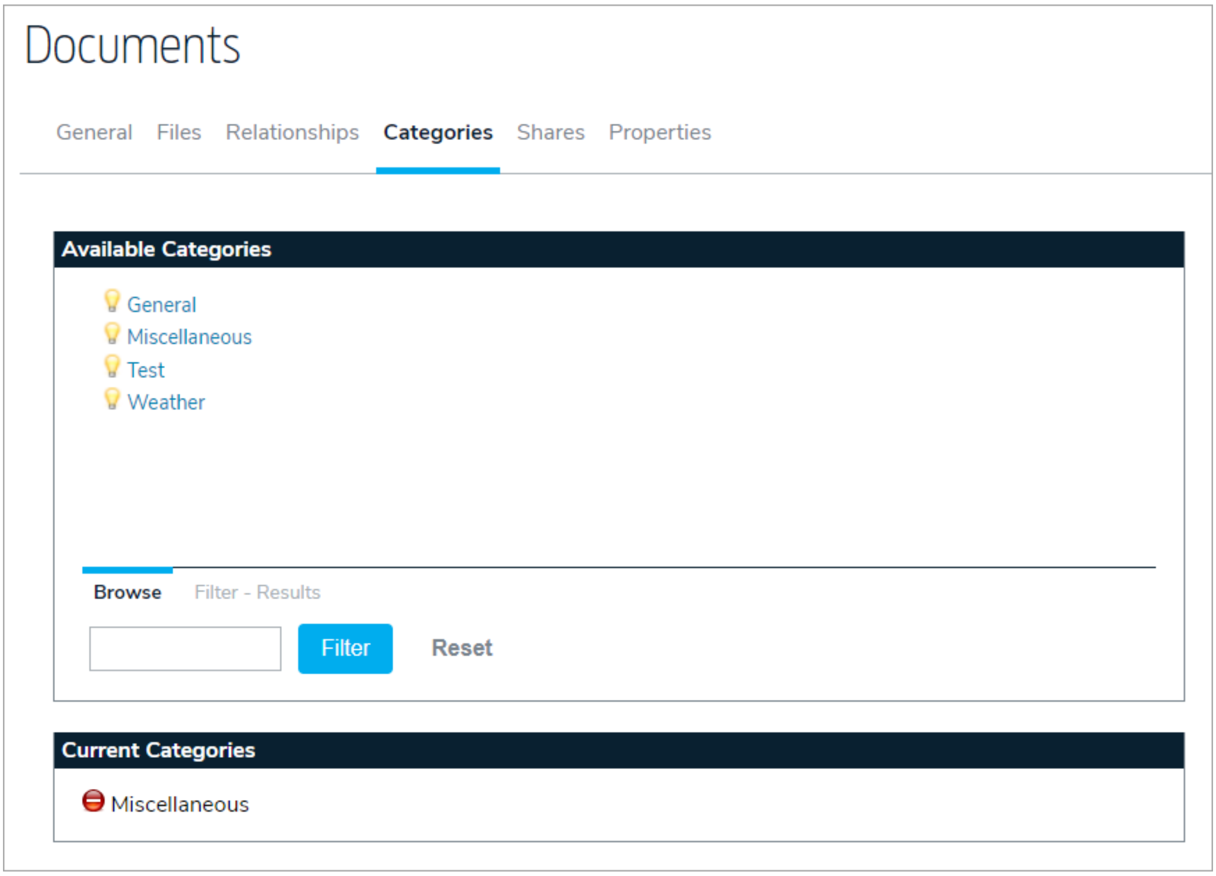
A new relationship in the relationships tab of an object.

5. Click the  icon to save the relationship.
6. Click the  icons to swap the objects in the relationship, delete the relationship, or view more information.

Document Categories

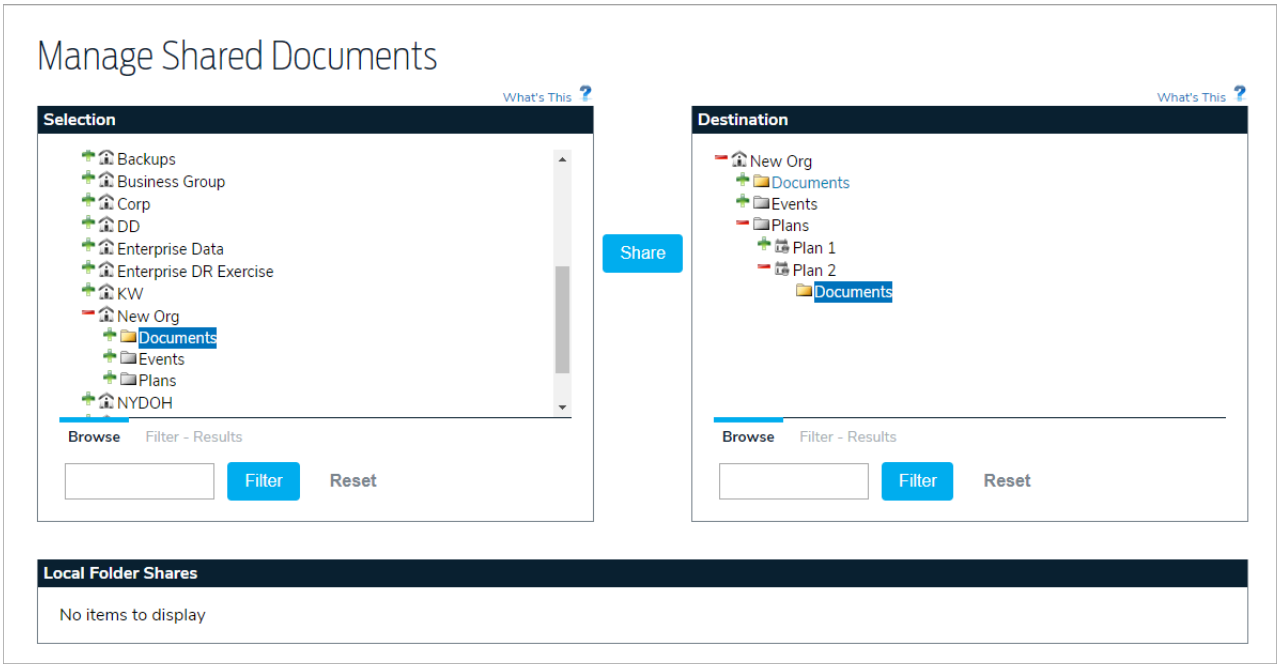
The Categories tab allows you to index the document record with categories and additional searching capabilities.

1. To select a category for a document, click Documents in the navigation bar, then open the document record.
2. Click the Categories tab.
3. Click a category to select it and add it to the Current Categories section. The available categories are configured in the Referential Data settings.

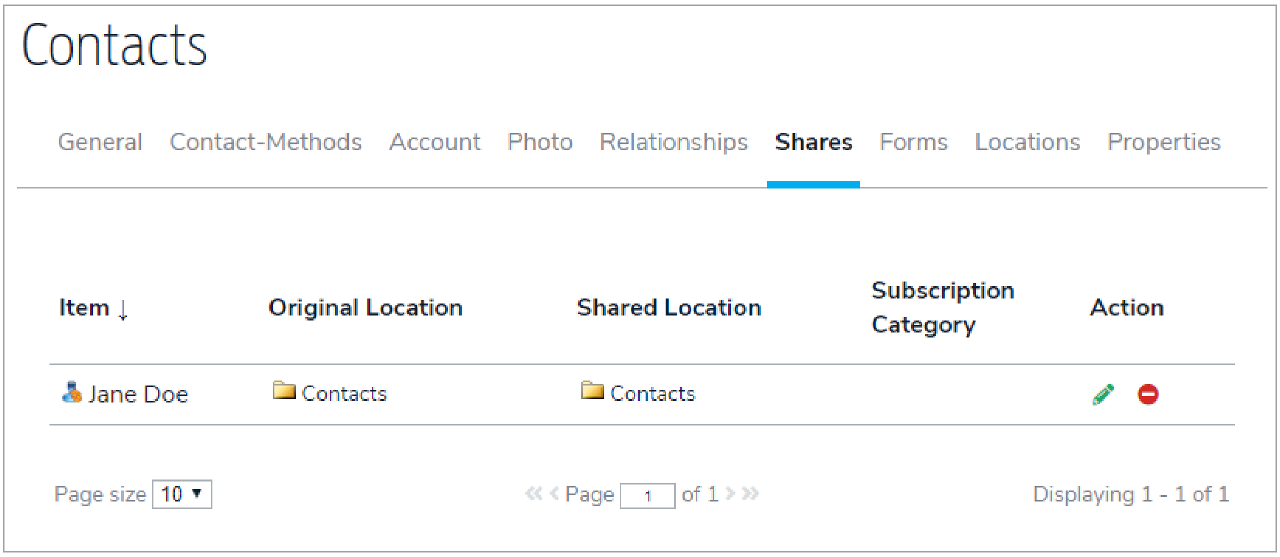


Document Shares

Contacts, Documents, Resources, and Forms can be shared across business units. By sharing, you are creating a link to the original source record. This does not duplicate the record, so any changes made will impact all shares. To share a contact record, click the appropriate icon in the navigation bar, then click Share to select which record will be shared and its destination.



To view where the record is shared, as well as the subscription categories the record is subscribed to, if any, for each folder, click the Shares tab in the record. Click the pencil icon to edit the share or the delete icon to remove it.



Document Properties

The Properties tab of a record allows you to select an account or role as an owner of the record, review system information, schedule reviews, view existing schedules, pending reviews, and the record's history.